

Resolving IDP Issues in AgLearn

If the supervisor is unable to Approve or Reject the subordinate's older plan locked in a Submit Pending status, the next step should be for you as an administrator to try to Cancel the plan by temporarily assigning a new supervisor.

First, verify with the user and supervisor that he/she has an older plan (the plan period expiration date has passed) that is "stuck" in Submit Pending status and that the supervisor was unable to approve or reject it. If you cannot visit the user's desk, run an IDP by Learner report to verify the status.

If the user does **not** have an older plan in Submit Pending status, but still cannot submit a current plan, it may be that an older Expired plan has a corresponding **Review** button in the Action column of the My Plans screen. If that is the case, simply ask the user to click the Review button and then follow the screen instructions.

Tasks to be performed by the Administrator **View Activity** Step 1. From the User Management menu, er a value for each field that you want to use to filter your search. Some fields allow you to select from a list of use. You can also add or remove search criteria to further refine your search. search for the user's record. (C) Yes @ No. esistin toblat Starts William 2. Click the edit icon to modify the record. User ID User Name KD998289 🚨 🎢 Fallow, Kathy 3. Organization Jot down the ID of the current supervisor (you will need to return the Q, Organization: user to this supervisor after you AK999999 Supervisor: complete this task. Coach: 4. Click the supervisor search icon. Supervisor: Coach: 5. Search Users Enter search criteria to locate the new Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of supervisor, and then click Search. values. You can also add or remove search criteria to further refine your search Note: You may want to use your own name as this person's temporary Case sensitive search: Tes No supervisor. Once you have confirmed that User ID: Starts With the IDP has been rejected, you can change the supervisor name back to the First Name: Starts With ▼ Dana actual supervisor. Middle Initial: Starts With



Resolving IDP Issues in AgLearn 6. Locate the new supervisor and then click Help Users the corresponding Select link. > Search Results Results Search View Users Results User ID User Name DK997140 King, Dana 7. Click Apply Changes to save the user Apply Changes record and launch the re-routing screen. 8. Click each of the check boxes to clear Re-Route Approvals the boxes (you do not want to re-route The former supervisor has outstanding approvals for this user. Select the approvals you want to redirect to the new supervisor. those approvals to the temporary supervisor. You are only interested in Scheduled Offerings cancelling the pending IDP approvals). SF-182 Requests Assessments: Performance Reviews IDP: All pending plan approvals will be cancelled 9. IDP: Click Re-Route Approvals. Re-Route Approvals Note: You should now contact the user and ask him/her to login to AgLearn and verify that the older plan is now cancelled and that the new plan now has a Submit for Approval button. 10. Regardless of success, you must Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search oriteria to further refine your search. change the user's supervisor back to the actual supervisor. If you were Case sensitive search: C Ves W No unable to "cancel" the IDP, report the issue to your Lead administrator so that an ATS ticket can be created. Bole ID: Active C Not Active C Both